## Criterion Convergence VIII: The Power of Invitation

### Full Conversation Listing:
**Times, Topics, Location, Questions and Participants**

**Monday, March 15, 2010**

**10:45 – 11:45 am**  
**Conversations – Set A**

<table>
<thead>
<tr>
<th>Conversation Topic</th>
<th>Questions</th>
<th>Participants</th>
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</thead>
</table>
| **For Profit/Nonprofit Structures for Social Change**  
**RUSACK** | • Walk through an overview of Structure Lab. Values, relationships, assets.  
• How does the structure/form of your organization affect what you see as possible?  
• What structures are most conducive to fostering the kind of relationship you want to build?  
• What can be done to expand awareness and shift thinking about structural options in the social change space? Who are the key players? | • Laura Berry  
• Sandie Davis  
• Tom Dente  
• Joseph Mouzon  
• Andrew Zolli  
• Valoria Cheek  
• Mark Monchek  
• Robin Pendoley  
• Whitney Smith  
• Sara Hall  
• Doug Hammond  
• **Joy Anderson** |
| **Metrics Tell Stories**  
**ROOM ONE** | • How do stories make better metrics?  
• How do metrics make better stories? | • Mitra Ardron  
• Ruy Costa  
• Andrew Levine  
• Deborah Stern  
• **Jackie VanderBrug**  
• Ann Vazquez  
• Melanie Moore Kubo  
• Jodi Harpstead  
• Louise Guido |
| **Community and Property Development**  
**MATTHEWS** | • What is the relationship between property development and community development?  
• What has changed as the fields have intersected over the last decades?  
• What are the current principles that matter?  
• What are the forces that will shape scenarios of the future? Capital? Local ownership? Enterprise models? Legal structures? What else? | • Elizabeth Stewart  
• Trinita Logue  
• Mark Peterson  
• Robert Wynn  
• Mary Gundelach  
• Adam Pattantyus  
• Ned Rimer  
• Jeanette Cadij  
• **James Macon**  
• Katie Drasser |
| Peace and Social Justice | • What shapes how you think about peace and justice?  
• How do we as individuals and societies make certain we bend towards justice as we seek social change?  
• What are the levers and tools that enable or ensure peace and justice? | • Rob Michalak  
• Frank Roby  
• Fiona Montagu  
• Sherry Sacino  
• Trinette McCray  
• Dawn Thomsen  
• Ben Bingham |

| PREFUNCTION AREA | • What shapes how you think about peace and justice?  
• How do we as individuals and societies make certain we bend towards justice as we seek social change?  
• What are the levers and tools that enable or ensure peace and justice? | • Rob Michalak  
• Frank Roby  
• Fiona Montagu  
• Sherry Sacino  
• Trinette McCray  
• Dawn Thomsen  
• Ben Bingham |

<table>
<thead>
<tr>
<th>1:15 – 2:30 pm</th>
<th>Conversations – Set B</th>
<th>Participants</th>
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</thead>
<tbody>
<tr>
<td>Conversation Topic</td>
<td>Questions</td>
<td>Participants</td>
</tr>
</tbody>
</table>
| How do I Maximize My Impact? | MATTHEWS  
• What is your big question about impact right now?  
• Discuss questions that surfaced in depth.  
• What are the themes and what is the way forward? | Robin Pendoley  
Laura Berry  
Ben Bingham  
Sandie Davis  
Mary Gundelach  
Rob Michalak  
Fiona Montagu  
Frank Roby  
Andrew Zolli  
Jeanette Cadij  
Louise Guido  
Jackie VanderBrug |
| What Makes a Consulting Firm Socially Responsible? | ROOM ONE  
• What is socially responsible consulting? How would you know it if you saw it?  
• How is the practice of consulting to nonprofits or socially responsible businesses changing?  
• What choices define your practice?  
• What do you aspire to?  
• Do the certification programs that exist for sustainable ventures work for consulting firms? E.g. B Lab, SVN  
• How does scale change the assessment of a socially responsible consulting firm? (i.e., do we look different at a guy hanging out a shingle than a Monitor) | Mitra Ardron  
Melanie Moore Kubo  
Adam Pattantyus  
Mark Monchek  
Doug Hammond  
Sara Hall  
Dawn Thomsen |
| Children’s Future | PREFUNCTION AREA  
• What would a quality future look like for children?  
• What do children need to have a quality future?  
• How much will they need to create for themselves and how much can we pay forward?  
• When is the role of education in improving and ensuring a quality future for children paramount? When do other elements take precedence?  
• Who are the heroes? Who are the villains? Who are the fools? | Trinita Logue  
Ned Rimer  
Robert Wynn  
Ann Vazquez  
Sherry Sacino  
Katie Drasser  
Joseph Mouzon  
Mark Peterson |
| Entering Social Change | RUSACK  
• What is your story of entering social change?  
• What surprised you when you showed up?  
• What are the characteristics of the social change marketplace that make this transition difficult?  
• What are the systems and structures that exist or need to be created to make it better? | Ruy Costa  
Elizabeth Stewart  
Trinette McCray  
Valoria Cheek  
Joy Anderson  
Tom Dente  
Jodi Harpstead  
Andrew Levine  
Deborah Stern |
## Conversations – Set C

### Healthcare Meets Financial Services

**ROOM ONE**

- What are the intersections between healthcare and financial services?
- What are the leverage points that each of us are addressing?
- Lay out of Criterion’s work around the cash market.
- Where do people see possibility and hope emerging?

**Participants**

- Tom Dente
- Ned Rimer
- Mitra Ardron
- Trinita Logue
- Rob Michalak
- Adam Pattantyus
- Robert Wynn
- James Macon

### Age of Irreverence

**RUSACK**

- This conversation assumes we are in an age of irreverence and that has a direct relationship to trust.
- What are the strengths and challenges of this current age of irreverence?
- What are the practices of social change that build trust in this age?

**Participants**

- Sherry Sacino
- Mary Gundelach
- Joseph Mouzon
- Ben Bingham
- Sandie Davis
- Andrew Levine
- Fiona Montagu
- Deborah Stern
- Louise Guido
- Dawn Thomsen

### Geography of Purpose

**PREFUNCTION AREA**

- What is the geography of your cause and purpose?
- What accelerates social change in a geographic area?
- What are the local characteristics that drive change?
- In particular, is there a geography of social enterprise and what’s the impact of this geography?

**Participants**

- Elizabeth Stewart
- Jodi Harpstead
- Mark Monchek
- Melanie Moore Kubo
- Andrew Zolli
- Sara Hall
- Katie Drasser
- Robin Pendoley

### Church as an Economic Being

**MATTHEWS**

- Presentation of the basic set of discoveries
- Leadership: who is leading thinking about this? In your community, nationally, globally?
- Messaging: what are the synonyms? Where is the resistance? What do the messages need to break through?
- Mapping: what are the examples of where this is working?
- Intermediation: 3 case studies around climate change, workforce, and fair trade

**Participants**

- Mark Peterson
- Laura Berry
- Ruy Costa
- Frank Roby
- Ann Vazquez
- Trinette McCray
- Doug Hammond
- Valoria Cheek
- Joy Anderson
### Tuesday, March 16, 2010

**9:30 – 10:45 am**  
**Conversations – Set D**

<table>
<thead>
<tr>
<th>Conversation Topic</th>
<th>Questions</th>
<th>Participants</th>
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| Power                                       | • How does your theory of power affect your theory of social change?  
• What influences how think about power?  
• Has how we think about power changed in the last decade?  
• How is this impacted by race, gender and class?  
• What is the power of invitation?                                                                 | • Trinette McCray  
• Frank Roby  
• Rob Michalak  
• Ben Bingham  
• Mark Monchek  
• Robin Pendoley  
• Mark Peterson  
• Whitney Smith  
• Louise Guido  
• Jackie VanderBrug |
| The Role of Accelerators                    | • Present the role that accelerators play and a set of assumptions about outcomes  
• Who’s your favorite accelerator?  
• What is the profile of an accelerator?  
• What is the identity they have/are given? In organizations as intrapreneurs? As independent workers? In the social change market more broadly?  
• How do we measure their impact?  
• What might they need to be more successful?                                                                 | • Ruy Costa  
• Jodi Harpstead  
• Andrew Levine  
• Fiona Montagu  
• Adam Pattantyus  
• Elizabeth Stewart  
• Melanie Moore Kubo  
• Ann Vazquez  
• Robert Wynn  
• Sara Hall  
• Doug Hammond  
• Joy Anderson |
| Role of IP in Social Innovation and an Increasingly Networked World | • What intellectual property do you worry about? What is the context?  
• What determines the value of IP in a market? And how is changing as we become more networked?  
• What is protectable? And what should be?  
• What is the play between brand and positioning and IP?                                                                                                                                                                     | • Laura Berry  
• Mary Gundelach  
• Andrew Zolli  
• Mitra Ardron  
• Sandie Davis  
• Deborah Stern  
• James Macon |
| Changing Behaviors                          | • Name case studies or experiences that shape how you think about behavior change.  
• What are the theories of change behind those case studies and experiences?  
• What are the competing theories of change?  
• How do these theories shape what practices work or don’t either at your organization or out in the world?                                                                                                                | • Ned Rimer  
• Sherry Sacino  
• Tom Dente  
• Joseph Muzon  
• Jeanette Cadig  
• Valoria Cheek  
• Dawn Thomsen |
## Conversations – Set E

<table>
<thead>
<tr>
<th>Conversation Topic</th>
<th>Questions</th>
<th>Participants</th>
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<tbody>
<tr>
<td><strong>Capitalism 3.0</strong></td>
<td>- Who is leading the reimagining of capitalism and who should be?</td>
<td>Joseph Mouzon</td>
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<tr>
<td></td>
<td>- What levers will shape our future of capitalism?</td>
<td>Rob Michalak</td>
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<td></td>
<td>- How will we know it’s happening?</td>
<td>Robert Wynn</td>
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<td></td>
<td>- What do you most long for?</td>
<td>Sara Hall</td>
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<td></td>
<td>- What gives you hope?</td>
<td>Andrew Zolli</td>
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<tr>
<td><em>Rusack</em></td>
<td></td>
<td>Jodi Harpstead</td>
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<td></td>
<td></td>
<td>Fiona Montagu</td>
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<td>Adam Pattantyus</td>
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<td></td>
<td></td>
<td>Louise Guido</td>
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<td></td>
<td></td>
<td>James Macon</td>
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<td><strong>Doing Church Well</strong></td>
<td>- In this conversation we will figure out the skills sets of doing church,</td>
<td>Laura Berry</td>
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<tr>
<td><em>Matthews</em></td>
<td>are they transferrable to folks who don’t live and breathe?</td>
<td>Mark Peterson</td>
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<td></td>
<td>- What are the skills of doing church? What makes them unique compared</td>
<td>Ann Vazquez</td>
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<td></td>
<td>to other complex systems?</td>
<td>Valoria Cheek</td>
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<td></td>
<td>- What is the value of this skill set?</td>
<td>Jackie VanderBrug</td>
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<td></td>
<td>- How/should doing church be taught? Who wants/needs to know?</td>
<td>Trinette McCray</td>
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<td><strong>Grief</strong></td>
<td>- How does grief change the world?</td>
<td>Ruy Costa</td>
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<td><em>Prefunction Area</em></td>
<td>- What enables you to stay present to emotions of all kinds and get</td>
<td>Melanie Moore Kubo</td>
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<td>through the day?</td>
<td>Whitney Smith</td>
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<td></td>
<td>- What resources have helped or hindered you?</td>
<td>Mary Gundelach</td>
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<td>- When did you see the sky again?</td>
<td>Dawn Thomsen</td>
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<td><strong>Change and Cultural Preservation</strong></td>
<td>- What’s the role of cultural preservation in social change? How is</td>
<td>Sandie Davis</td>
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<tr>
<td><em>Room One</em></td>
<td>cultural preservation a disruptive force?</td>
<td>Ned Rimer</td>
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<td>- Where have you witnessed good examples of this? What are the classic</td>
<td>Robin Pendoley</td>
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<td>stories you tell?</td>
<td>Sherry Sacino</td>
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<td></td>
<td>- What can we learn from those examples?</td>
<td>Mitra Ardron</td>
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<td></td>
<td></td>
<td>Ben Bingham</td>
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<td></td>
<td>Doug Hammond</td>
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<td></td>
<td>Jeanette Cadij</td>
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<td><strong>Multipurpose Work Forms</strong></td>
<td>- Once round. What is your portfolio? How do you allocate resources</td>
<td>Tom Dente</td>
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<tr>
<td><em>Matthews</em></td>
<td>(time, money, other) across the portfolio?</td>
<td>Andrew Levine</td>
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<td>- What is the form/platform that organizes the work? (my bank account,</td>
<td>Frank Roby</td>
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<td>corporate form, website, etc)</td>
<td>Deborah Stern</td>
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<td>- What is the identity that holds it all together?</td>
<td>Mark Monchek</td>
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<td>- How do you manage risks or allocate returns across the portfolio?</td>
<td>Elizabeth Stewart</td>
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<td>- What pressures does this create? How long can you manage this way?</td>
<td>Joy Anderson</td>
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<td>What’s going to make it fundamentally not sustainable?</td>
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<tr>
<td>Conversation Topic</td>
<td>Questions</td>
<td>Participants</td>
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</table>
| Market Formation        | • How do you build organizations that shape markets to create social/environmental good?  
• What are our assumptions about markets and how they function?  
• What are the practices of market formation?  
• In the end, it is intermediation that creates markets. Costs, efficiencies, ethics around it (good vs. bad), what makes a good intermediary?  
• What role can legacy non-profits play in shaping markets for good? | Rob Michalak  
Ann Vazquez  
Andrew Zolli  
Joy Anderson  
Valoria Cheek  
Doug Hammond  
Trinette McCray  
Elizabeth Stewart  
Deborah Stern  
Adam Pattantyus  
Tom Dente  
Mitra Ardron  
James Macon |
| Future of Philanthropy   | • What changed in your philanthropy over the last years?  
• When does philanthropy create strategic impact?  
• How do we promote and participate in critical thinking and collective accountability in the philanthropic sector?  
• Where can philanthropy be more innovative?  
• What would change if we changed who participates in philanthropy (e.g. mainstream donors)? | Laura Berry  
Sandie Davis  
Fiona Montagu  
Ned Rimer  
Frank Roby  
Jackie VanderBrug  
Melanie Moore Kubo  
Sherry Sacino  
Sara Hall |
| Successful Nonprofits    | • What makes a nonprofit good? What are the core characteristics?  
• What values drive us in determining what is good?  
• How do you build a good one?  
• How would the world change if all nonprofits were good? | Jodi Harpstead  
Robin Pendoley  
Robert Wynn  
Ruy Costa  
Mark Peterson  
Whitney Smith  
Katie Drasser |
| Art in Social Change     | • How does art express and/or drive social change?  
• What is the particular role of artists in social change?  
• How can various techniques used in art be applied to social change efforts?  
• What is the role of the critic? | Ben Bingham  
Joseph Mouzon  
Mary Gundelach  
Andrew Levine  
Mark Monchek  
Louise Guido  
Dawn Thomsen |